

Quality Improvement Storyboard

Out of State Travel Authorization Process

Plan

1. Getting Started

In 2012, the Bureau's out of state travel authorization process was identified as the Bureau's first quality improvement project. It was determined that nearly 100% of all travel requests submitted are returned to travelers due to insufficient information and/or documentation. In addition, travel authorization requests were taking 23 days or longer to get approved. It was imperative to evaluate the process and streamline to the extent possible.

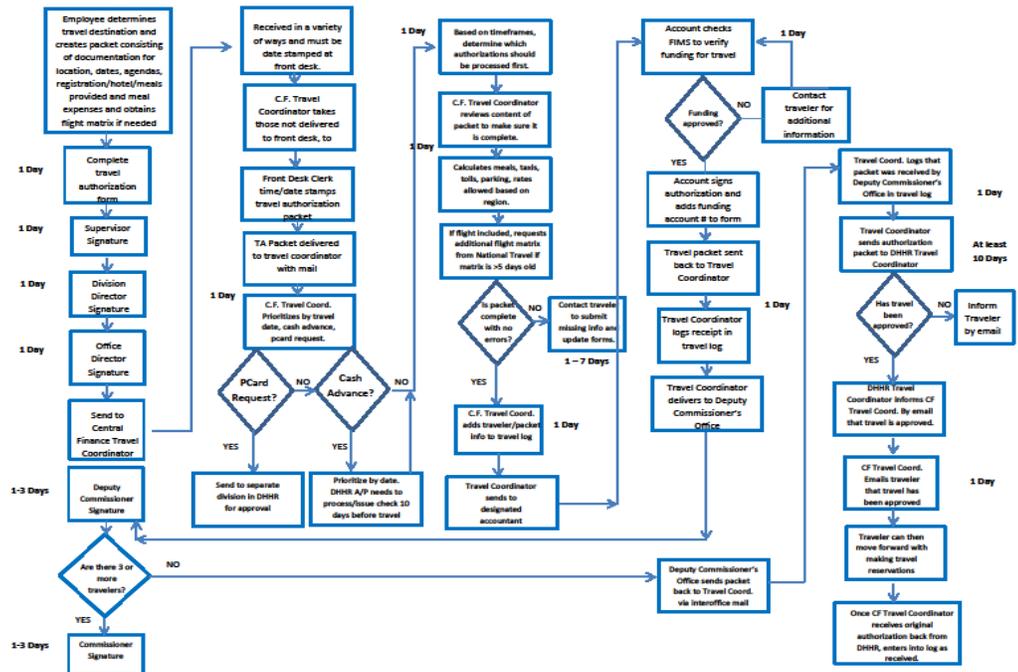
2. Assemble the Team

Team members were identified for the project through a Quality Improvement workshop held with Public Health Foundation. Team members volunteered to participate in the project due to the impact that the process delays has had on employees and programs throughout the Bureau. Team members included the Director for Performance Management; Associate Director of Health Promotion & Chronic Disease; Food Program Manager for the Office of Environmental Health Services; Director, Environmental Engineering Division; Data System Coordinator, Emergency Medical Services; and from the Office of Maternal, Child & Family Health, Director, Quality Assurance Monitoring Team, and Director, Research, Evaluation and Planning.

3. Examine the Current Approach

To understand the current process, the QI team met with the Bureau's CFO and Travel Coordinator. The Travel Coordinator is primarily responsible for processing all Bureau for Public Health's out of state travel authorization and reimbursement requests. The team mapped out the current process using a flow chart (see Figure 1). The current process requires several levels of approving authority, one individual processing all requests and requesting additional information when necessary, and an additional level of approval at the Department of Health & Human Resources level. At this time, we are able to review and recommend an approach to impact the Bureau level process.

Figure 1



4. Identify Potential Solutions

The project team used QI tools such as brainstorming and the 5-Why's to determine the root causes for some of steps involved in the process. By doing this, the project team was able to identify potential solutions for a more efficient process:

- Work with Travel Coordinator to create a "Check-Off List" of all materials required to make an Out of State Travel Authorization "complete."
- All travel requests must be delivered to the Central Finance Front Desk to prevent delays in processing.
- Set parameters on how many days that travel information should be held by the Travel Coordinator. Proposal – All travel authorization requests should not be held more than 3 business days.
- Approval level should stop at the Office Director level unless the travel request is \geq \$2,500. This would remove the additional step of approval by the Deputy Commissioner.
- Hire additional staff support to assist with Travel Coordinator responsibilities. Separate the travel authorization and reimbursement responsibilities among the two positions. Cross-train both positions.

5. Develop an Improvement Theory

If the Bureau Executive Team provides guidance and/or a policy to the Bureau Leadership Team on implementing a revised travel process, with the recommendations suggested by the QI team, processing time should improve.

Do

6. Test the Theory

A revised travel process was approved in October 2012 with minor revisions from the Executive Team (i.e. travel requests \leq \$1,800 can be approved at the Office Director level, decisions based on travel tiers). All Office Directors were given the flexibility to send authorizations to the Commissioner's Office at their discretion.

Study

To be updated in future.